HIGHLIGHTS

WEEK ENDING: FEBRUARY 15, 1991

INDUSTRY WEEKLY SALES

- This week's volume of 8.0 billion units was 1.9 billion units below the industry's estimated going rate. Sales were influenced by orders advanced into this week as a result of the Presidents' Birthday Holiday. For the seventh consecutive week, sales were impacted by the depletion of excess inventory following year-end trade programs.

PM WEEKLY SALES & SHARE

- This week's volume of 3.2 billion units was below PM's going rate as direct customers continue to exhaust excess inventory from 1990. Collectively, accounts reduced their year-end excess inventory levels by approximately 1.0 billion units this week, with an additional 0.4 billion units remaining from year-end forecast.

- PM's weekly and year-to-date shares of 40.4 and 36.4 respectively remained understated due to the different excess inventory levels of the other manufacturers. PM's weekly share was -1.5 below year-ago, while its year-to-date share increased by 1.2 points.

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Source: https://www.industrydocuments.ucsf.edu/docs/kjgn0004

HIGHLIGHTS
WEEK ENDING: February 15, 1991

INDUSTRY WEEKLY SALES

- This week's volume of 8.0 billion units was 1.9 billion units below the industry's estimated going rate and about even with the weekly projection. Sales were influenced by orders advanced into this week as a result of the Presidents' Birthday Holiday. For the seventh consecutive week, sales were impacted by the depletion of excess inventory following year-end trade programs.

PM WEEKLY SALES

- This week's volume of 3.2 billion units was below PM's going rate as direct customers continue to exhaust excess inventory from 1990. Sales were below forecast by 232 million units, with Marlboro accounting for the majority of the deficit. Collectively, accounts reduced their year-end excess inventory levels by approximately 1.0 billion units this week, with an additional 0.4 billion units remaining from year-end forecast.

- PM's weekly and year-to-date shares of 40.4 and 36.3 respectively remained understated due to the different excess inventory levels of the other manufacturers. PM's weekly share was -1.5 below year-ago, while its year-to-date share increased by 1.1 points.

DEVELOPMENTS

- RJR
  Dakota will be tested in Arizona, in a new slide out box pack, beginning in February.

- According to Field Sales, Salem Gold has been discontinued in the Cleveland/Akron test market.

- LORILLARD
  Test marketing began during February for Style 100's at two price tiers: Branded Generic in New Orleans and Full Margin in the Hartford area.

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